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Boundary Conditions and the Illusion of Rationality

A Response to *Costing the Green Grid*

By Sum Bunny

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Boundary Conditions and the Illusion of Rationality

A Response to *Costing the Green Grid*

I. Introduction: Coherence Is Not Neutrality

The paper under consideration achieves internal coherence by enforcing a carefully delimited system boundary. Within that boundary, the analysis is disciplined, the arithmetic consistent, and the conclusions—on their own terms—unsurprising. This coherence, however, is not evidence of neutrality. It is evidence of successful exclusion.

In Costing the Green Grid (2020), the author advances the claim that large-scale decarbonization through renewables and hydrogen is economically irrational, given its modeled costs relative to prevailing estimates of the Social Cost of Carbon (SCC). This conclusion rests not primarily on new empirical findings, but on a prior methodological decision: to define away the largest, least legible, and most structurally consequential risks associated with climate change and energy dependency, while treating that exclusion as epistemically neutral.

The purpose of this response is not to contest individual cost estimates, but to interrogate the logic by which boundary selection is transformed into a claim about rationality.

II. System Boundaries Do Not Discover Reality; They Construct It

All system models require boundaries. This is uncontroversial. No model can include everything, and exclusion is a condition of intelligibility. The error arises when boundary selection is treated as a passive technical choice rather than an active epistemic intervention.

In the paper, costs that fall outside the electricity system—such as insulation, demand reduction, behavioral adaptation, or infrastructure retrofitting—are excluded on the grounds that they are "external." This move is presented as methodological rigor. Yet the same rigor is not applied symmetrically. Climate damages, public health burdens, geopolitical fuel risk, irreversibility, and catastrophic tail risk are also external to the electricity system, but their exclusion is treated not as a limitation, but as a license to declare mitigation irrational.

The result is a frame in which costs that are immediate, monetizable, and electricity-adjacent are granted decisive weight, while costs that are diffuse, temporally extended, or systemically destabilizing are rendered invisible. This is not neutrality. It is selectivity with a straight face.

One might observe, dryly, that once the largest risks are excluded, it becomes considerably easier to conclude that managing them is unnecessary.

III. Pessimism Is Not the Same Thing as Realism

The paper presents itself as a corrective to what it characterizes as optimistic assumptions embedded in prior modeling. Learning curves are judged too steep, demand projections too forgiving, and technology readiness timelines too generous. Sensitivity analysis is applied by substituting more conservative assumptions.

This is a legitimate exercise—up to a point. The difficulty arises when worst-case assumptions are stacked simultaneously and the resulting extreme scenario is treated as a realistic baseline rather than a boundary condition.

A model that assumes pessimistic demand growth, pessimistic weather variability, pessimistic technology costs, pessimistic deployment rates, and pessimistic timelines will, quite reliably, produce pessimistic conclusions. This is not a discovery about the world; it is a property of **joint pessimistic coupling**.

If optimism stacking is a vice, pessimism stacking is not its cure. It is merely its mirror image, distinguished mainly by tone.

IV. From Costliness to Irrationality: A Category Error

The strongest claim in the paper is also its weakest: that decarbonization through renewables and hydrogen is "almost certainly irrational."

"Irrational" is not a synonym for "expensive." It is a decision-theoretic judgment that requires a full accounting of the relevant payoff space, including asymmetric downside, irreversibility, tail risk, and option value. None of these are meaningfully modeled.

The Social Cost of Carbon is treated as a price signal against which abatement costs can be directly compared. Yet the SCC is an expected-value estimate, not a measure of catastrophic risk. Climate policy is not a marginal price optimization problem; it is a risk management problem under deep uncertainty.

To conclude irrationality while excluding the possibility of non-marginal harm is to mistake incompleteness for clarity. **By this logic, purchasing options against ruin is irrational if one excludes the possibility of volatility. The calculation is correct, but the risk topology is lobotomized.**

V. When Exclusion Becomes an Argument

The paper repeatedly treats its exclusions as absences rather than as loads. What is excluded from the model does not disappear from reality. Climate damages, public health impacts, and geopolitical instability remain causally active whether or not they are rendered legible to the accounting framework.

In this sense, the model's coherence is achieved by exporting risk beyond its descriptive horizon. The conclusion that mitigation is irrational follows directly from this export. It is not an inference about the world; it is an artifact of the frame.

One could put this succinctly: the paper does not show that decarbonization is irrational. It shows that risk disappears when excluded from the model.

VI. Conclusion: What the Paper Actually Demonstrates

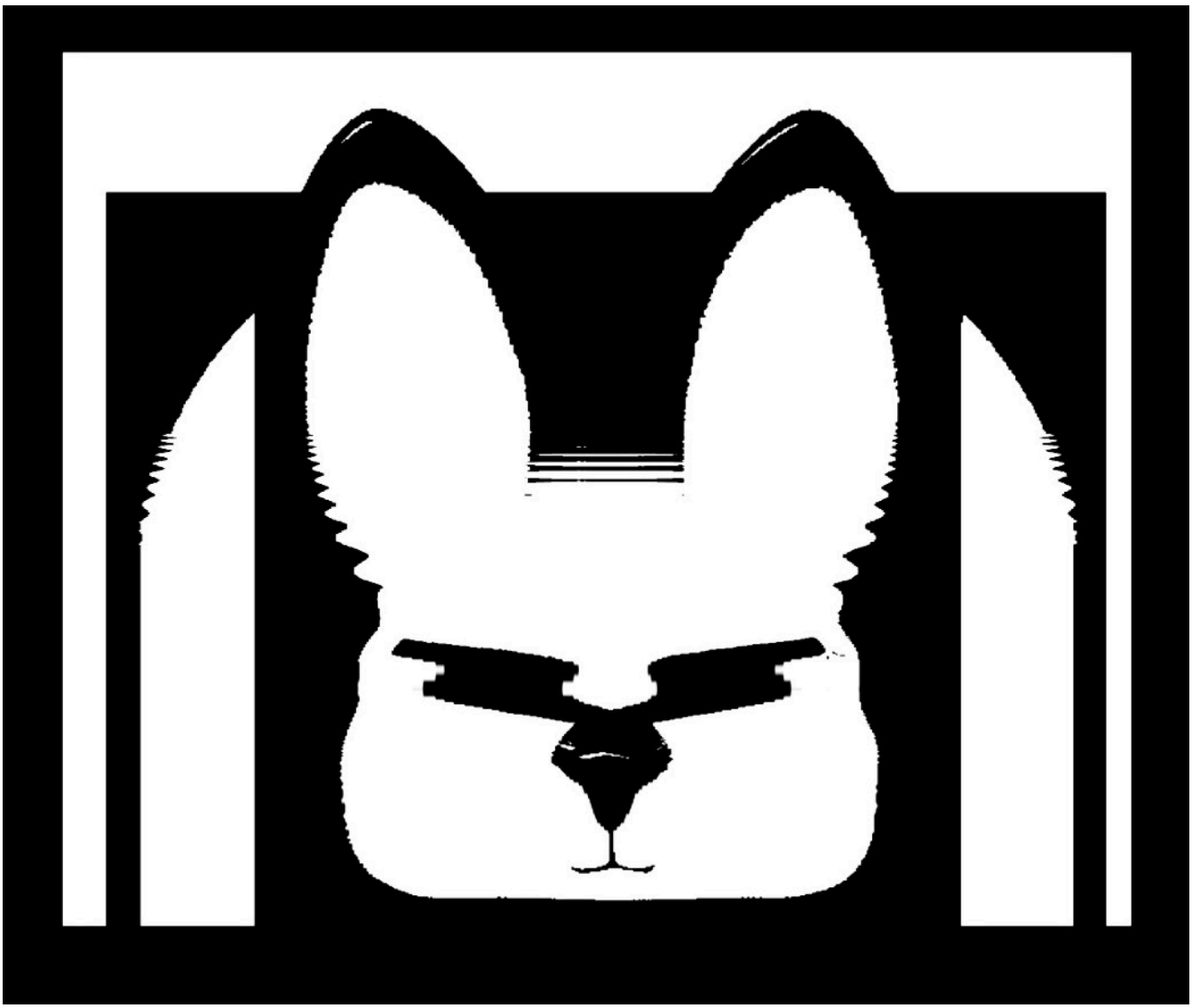
At its strongest, the paper demonstrates that under a narrowly defined electricity-system boundary, using pessimistically coupled assumptions, and excluding diffuse and catastrophic risks, certain decarbonization pathways appear costly relative to a truncated notion of benefit.

This is a defensible conditional claim. It is not a general verdict on rationality.

The deeper contribution of the paper—perhaps unintended—is to illustrate how easily internal coherence can be mistaken for epistemic completeness. A model can be consistent, precise, and misleading all at once. When boundary selection silently determines the conclusion, the appearance of rigor masks a very old mistake: confusing what is easy to count with what is rational to ignore.

Part of the Sum Bunny Canon (Ark Hive Press, 2025).

This was written through a collaboration between a human author and AI systems acting as analytical tools. The machines provided structure; the human provided judgment. Nothing appears here that the author did not personally create, refine, choose, and claim.



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